

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp: 
RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

2019 SEP 27 PM 4:07

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): The Pew Charitable Trusts

Travel date(s): September 13-15, 2019

Name of accompanying family member (if any): n/a

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$58	\$268	115.50	
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): See attached.

9/23/2019
(Date)

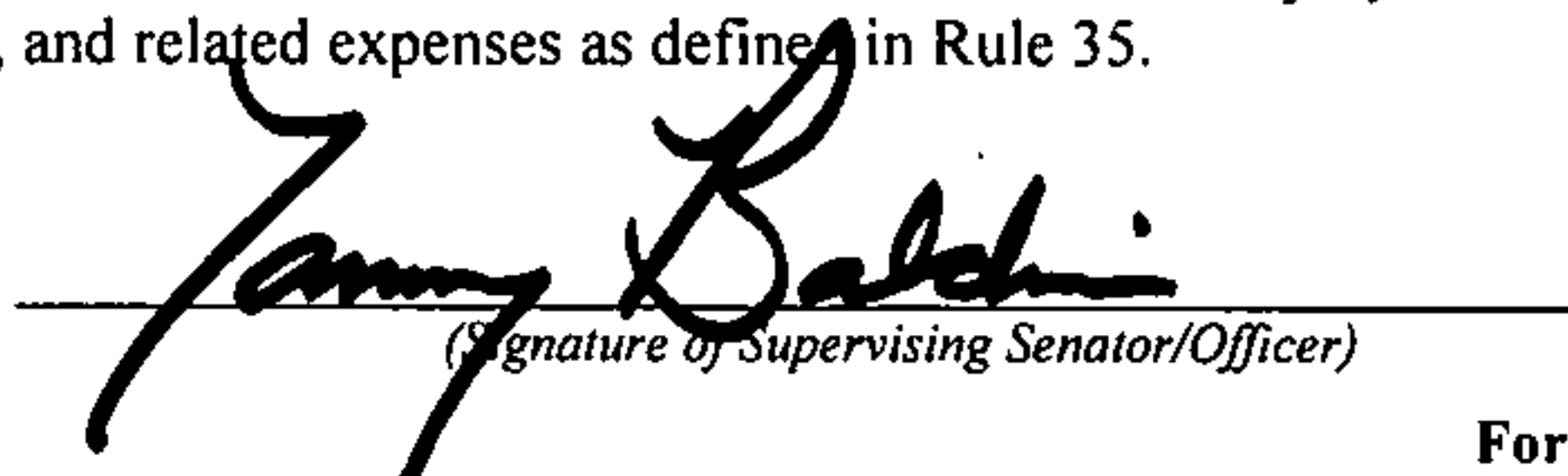
William Murat
(Printed name of traveler)


(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

9/23/19
(Date)


(Signature of Supervising Senator/Officer)

Dinner with Governor Hogan speaking to the challenges and successes of divided government; Amy Mitchell of the Pew Research Center speaking on their recently completed research on Americans' views of their local news; Lunch with Capt. Thomas Buchanan, Commandant of Midshipmen, U.S. Naval Academy speaking to the Academy's mission and the role of Senators in making nominations; a lecture by Professor James Freeman (Yale University) regarding the history of violence in congress; a briefing by David Pogue of the New York Times, regarding artificial intelligence, robotics and the impact on American workers; Dinner with Derrick Wang, composer of "Scalia/Ginsburg" regarding the relationship of two justices whose views were often at odds with each other; an Ira Chaleff regarding the role of a Senate Chief of Staff.

Dinner with Governor Hogan speaking to the challenges and successes of divided government; Amy Mitchell of the Pew Research Center speaking on their recently completed research on Americans' views of their local news; Lunch with Capt. Thomas Buchanan, Commandant of Midshipmen, U.S. Naval Academy speaking to the Academy's mission and the role of Senators in making nominations; a lecture by Professor James Freeman (Yale University) regarding the history of violence in congress; a briefing by David Pogue of the New York Times, regarding artificial intelligence, robotics and the impact on American workers; Dinner with Derrick Wang, composer of "Scalia/Ginsburg" regarding the relationship of two justices whose views were often at odds with each other; an Ira Chaleff regarding the role of a Senate Chief of Staff.

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

-
1. Sponsor(s) of the trip (please list all sponsors): The Pew Charitable Trusts
 2. Description of the trip: Senate Chiefs of Staff Management and Leadership Conference
 3. Dates of travel: September 13-15, 2019
 4. Place of travel: Annapolis, MD
 5. Name and title of Senate invitees: Chiefs of Staff (see attached list)
 6. I *certify* that the trip fits one of the following categories:
☐ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

= OR =

☒ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
 7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.

= AND =

☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
 8. I *certify* that:
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.

= AND =

☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. USE ONLY IF YOU CHECKED QUESTION 6(B)

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

- OR -

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

OR

- ☒ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. USE ONLY IF YOU CHECKED QUESTION 9(B)

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Pew Charitable Trusts is the sole organizer and sponsor of this trip.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

See attachment.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

See attachment.

60
 61
 62
 63
 64
 65
 66
 67
 68
 69
 70
 71
 72
 73

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

See attachment.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$60/roundtrip	\$268	\$115.50	

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip has been arranged specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Annapolis was selected due to its close proximity to Washington, DC and its historical significance.

19. Name and location of hotel or other lodging facility:

The Historic Inns of Annapolis, 58 State Cir, Annapolis, MD 21401.

20. Reason(s) for selecting hotel or other lodging facility:

The Historic Inns can provide the necessary meeting space for the planned seminars and can provide the required number of guest rooms to accommodate the group.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Lodging and meals are at the federal per diem rate for Annapolis, MD.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Roundtrip transportation to Annapolis will be provided via coach charter buses.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: Tamer Luzzetto

Name and Title: Tamera Luzzatto

Name of Organization: **The Pew Charitable Trusts**

Address: 901 E Street, NW, Washington, DC, 20004

Telephone Number: (202) 552-2000

Fax Number: (202) 552-2299

E-mail Address: tluzzatto@pewtrusts.org

7

15. The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations and concerned citizens who share our commitment to fact-based solutions and goal-driven investments to improve society. Pew issues dozens of research reports each year to educate the public and policy makers. Pew also sponsors convenings of researchers and experts to examine various issues of public policy and civic life.

57 62 63 64 65 66 67 68 69 70



Bipartisan Senate Chiefs of Staff Conference **Annapolis, Maryland | September 13-15, 2019**



Conference Schedule

Friday, September 13, 2019

- 2:30pm Depart Dirksen via buses
- 3:30-4:30pm **Maryland State House – Greeting by Senator Ben Cardin**
The oldest American state house in continuous legislative use, dating to 1779, and the U.S. Capitol from November 26, 1783, to August 19, 1784. Senator Cardin will welcome chiefs to his state capital and speak about his legislative experiences working across the aisle.
- 4:30pm Walk to the Historic Inns of Annapolis.
Luggage retrieval and hotel check-in.
- 6:00-8:00pm **Dinner – Governor’s Mansion with visit by Governor and Mrs. Hogan.**
Governor Lawrence J. Hogan, Jr. was sworn in as the 62nd governor of the State of Maryland on January 21, 2015. In 2018, he was re-elected to a second four-year term. Maryland’s first lady is Yumi Hogan, a first-generation Korean-American, artist and teacher. Governor Hogan will address his challenges and successes leading a politically-divided state government.

Saturday, September 14, 2019

- 8:30-9:30am Breakfast at your leisure, Calvert House, Historic Inns
- 9:30-11:00am **Amy Mitchell, Pew Research Center**
Americans’ Views of Their Local News.
With an informed citizenry being essential to an effective democracy, where Americans get their news and their trust in those sources is critical. While much attention is paid to national cable news, a significant number of Americans still rely on local sources for news and information. Amy Mitchell will discuss Pew’s recent survey of 34,897 adults on their views of local news and the implications for policymakers.
- 11:00am-11:30am Break

2019 Bipartisan Senate Chiefs of Staff Conference
September 13-15, 2019
List of Invited Staff

First Name	Last Name	Senate Office
Steve	Abbott	Sen. Susan M. Collins
Michelle	Altman	Sen. James P. Lankford
Michelle	Barlow Richardson	Sen. Roger F. Wicker
Allyson	Bell	Sen. Mike Lee
Reynaldo	Benitez	Sen. Catherine M. Cortez Masto
Sarah	Benzing	Sen. Sherrod C. Brown
Cassie	Bladow	Sen. John H. Hoeven III
Tony	Blando	Sen. Ron H. Johnson
Daniel	Brandt	Sen. Pat J. Toomey
Joe	Britton	Sen. Martin T. Heinrich
Brennen	Britton	Sen. Jerry Moran
Joel	Brubaker	Sen. Shelley Moore Capito
Jami	Burgess	Sen. Maria Cantwell
Larry	Burton	Sen. Dan S. Sullivan
Neil	Campbell	Sen. Jack F. Reed
Joi	Chaney	Sen. Kirsten E. Gillibrand
Steve	Chartan	Sen. Ted Cruz
David	Cleary	Sen. Lamar Alexander
Dara	Cohen	Sen. Jacklyn S. Rosen
Caryn	Compton	Sen. Bernie Sanders
John	Connell	Sen. Todd C. Young
Kathleen	Connery Dawe	Sen. Angus S. King Jr.
Jackie	Cottrell	Sen. Pat Roberts
Doug	Coutts	Sen. Tom Cotton
Aaron	Cummings	Sen. Chuck Grassley
Dayne	Cutrell	Sen. Richard C. Shelby
Jonathan	Davidson	Sen. Michael F. Bennet
Jennifer	DeCasper	Sen. Tim E. Scott
J.P.	Dowd	Sen. Patrick J. Leahy
Eric	Einhorn	Sen. Brian E. Schatz
Kaitlin	Fahey	Sen. Tammy Duckworth
Eric	Feldman	Sen. Gary C. Peters
Charles	Flint	Sen. Marsha Blackburn
Kristen	Gentile	Sen. Bob Casey
Lisa	Goeas	Sen. Joni K. Ernst
Marc	Goldberg	Sen. Maggie Hassan
Samuel	Goodstein	Sen. Sheldon Whitehouse
David	Grannis	Sen. Dianne Feinstein
Dana	Gresham	Sen. Doug Jones
Mark	Gruman	Sen. Kevin J. Cramer

00
7
2
0
0
0
0
0
0
0
0
0

/

2019 Bipartisan Senate Chiefs of Staff Conference
September 13-15, 2019
List of Invited Staff

First Name	Last Name	Senate Office
Richard	Perry	Sen. Lindsey Graham
Brendon	Plack	Senate Majority Whip
Kyle	Plotkin	Sen. Josh Hawley
James	Quinn	Sen. Bill Cassidy
Sydney	Reed	Sen. Pat Roberts
Karen	Robb	Sen. Chris J. Van Hollen Jr.
Preston	Robinson	Sen. John N. Kennedy
Justin	Roth	Sen. Martha E. McSally
Tricia	Russell	Sen. Cory A. Booker
Erin	Sager Vaughn	Sen. Charles E. Schumer
Raymond	Sass	Sen. Ben Sasse
Jacqueline	Schutz Zeckman	Sen. Rick Scott
Sharon	Soderstrom	Senate Majority Leader
Patrick	Souders	Sen. Dick Durbin
Emily	Spain	Sen. Tom R. Carper
Jonathan	Stahler	Sen. Christopher A. Coons
Curtis	Swager	Sen. Cory S. Gardner
Jason	Thielman	Sen. Steve Daines
Fred	Turner	Sen. Bob Menendez
Matt	Van Kuiken	Sen. Debbie A. Stabenow
Matt	Waldrip	Sen. Mitt Romney
Susan	Wheeler	Sen. Mike D. Crapo
Brad	White	Sen. Cindy Hyde-Smith
Megan	Whittemore	Sen. David A. Perdue Jr.
Michael	Zamore	Sen. Jeff A. Merkley



The Pew Charitable Trusts

**Invites You and Your Spouse/Significant Other
To the 7th Biennial**

Senate Chiefs of Staff Management and Leadership Conference

Annapolis, Maryland
September 13-15, 2019

The Pew Charitable Trusts will host a conference for the Senate Chiefs of Staff from September 13-15, 2019, in Annapolis, Maryland. It promises to be an engaging weekend where you can learn from some of the most interesting speakers on management, leadership, and civility today. A copy of the agenda is attached.

We will depart from behind the Dirksen Building on Friday, September 13, on a chartered bus and return on Sunday, September 15. Chiefs' expenses (minus alcohol and entertainment) are covered by The Pew Charitable Trusts. If you wish to invite your spouse, you may reimburse Pew for those expenses (estimated at around \$175) after the conference.

Your pre-travel paperwork is due to the Select Committee on Ethics, 220 Hart, no later than Wednesday, August 14, 2019. You do not need to list accompanying spouses/significant others on the ethics form. [Click here to download the paperwork.](#)

Click here to register

If you are unable to attend, please [click here](#).
We look forward to seeing you in historic Annapolis this fall!

Tamera Luzzatto
Senior Vice President, Government Relations
The Pew Charitable Trusts
tluzzatto@pewtrusts.org
(202) 540-6501

EMPLOYEE PRE-TRAVEL AUTHORIZATION

ETHIC AUG 1'19AM11:35

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics** in **SH-220**. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Bill Murat

Employing Office/Committee: Senator Tammy Baldwin

Private Sponsor(s) (list all): The Pew Charitable Trusts

Travel date(s): **September 13-15, 2019**

Note: If you plan to extend the trip for any reason you must notify the Committee.

Destination(s): Annapolis, MD

Explain how this trip is specifically connected to the traveler's official or representational duties:

The Bipartisan Chiefs of Staff Management and Leadership Conference provides a unique opportunity to receive training specifically tailored for Senate Chiefs of Staff. This includes training on effective communication, providing meaningful evaluation and feedback to the Senator and staff, and insights on significant issues that the Senate will be confronting. In addition the conference will provide valuable insights into leadership in a politically divided government. As Chief of Staff, I deal with these challenges of leadership, management and policy on a daily basis.

Name of accompanying family member (if any): N/A

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

July 31, 2019
(Date)

Bier Munaf
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):


I, Tammy Baldwin hereby authorize Bill Murat
(Print Senator's/Officer's Name) *(Print Traveler's Name)*

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

July 31, 2019
(Date)

ee's spouse or child is appropriate to assist in the representation


(Signature of Supervising Senator/Officer)

Form RL

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): The Pew Charitable Trusts
2. Description of the trip: Senate Chiefs of Staff Management and Leadership Conference
3. Dates of travel: September 13-15, 2019
4. Place of travel: Annapolis, MD
5. Name and title of Senate invitees: Chiefs of Staff (see attached list)
6. I *certify* that the trip fits one of the following categories:
 - ☐ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - OR –
 - ☒ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
 - AND –
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
 - AND –
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

– OR –

☒ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Pew Charitable Trusts is the sole organizer and sponsor of this trip.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

See attachment.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

See attachment.

11
12
13
14
15
16
17
18
19
20
21
22
23
24
25
26
27
28
29
30

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

See attachment.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$60/roundtrip	\$268	\$115.50	

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip has been arranged specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Annapolis was selected due to its close proximity to Washington, DC and its historical significance.

19. Name and location of hotel or other lodging facility:

The Historic Inns of Annapolis, 58 State Cir, Annapolis, MD 21401.

20. Reason(s) for selecting hotel or other lodging facility:

The Historic Inns can provide the necessary meeting space for the planned seminars and can provide the required number of guest rooms to accommodate the group.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Lodging and meals are at the federal per diem rate for Annapolis, MD.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Transportation to Annapolis will be provided via coach charter buses.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

N/A

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: Tamara Luzzetto

Name and Title: Tamera Luzzatto.

Name of Organization: The Pew Charitable Trusts

Address: 901 E Street, NW, Washington, DC, 20004

Telephone Number: (202) 552-2000

Fax Number: (202) 552-2299

E-mail Address: tluzzatto@pewtrusts.org

CO
CO
2
CO
CO
CO
CO
CO
CO
CO
CO
CO

- 1-10. See form.
11. See attachment.
12. See form.
13. Through both its information and advocacy work, The Pew Charitable Trusts seeks to inform and advance the development of sound public policy in the United States, as well as to strengthen the institutions that form the foundations of our democracy. A major component of this ongoing strategy has been to help create an environment in which policy makers can productively deliberate important issues of the day. The purpose of the conference is to provide a collaborative environment for the chiefs of staff to learn from experts and discuss issues of importance to an effective legislative process.
14. The Pew Charitable Trusts has directly sponsored congressional travel. This will be the seventh Senate chiefs of staff conference hosted by Pew (2007, 2009, 2011, 2014, 2015, 2017). In the past, the Pew Charitable Trusts has also funded other institutions via grants to conduct their educational programs and some of these programs may have included congressional travel.
15. The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations and concerned citizens who share our commitment to fact-based solutions and goal-driven investments to improve society. Pew issues dozens of research reports each year to educate the public and policy makers. Pew also sponsors convenings of researchers and experts to examine various issues of public policy and civic life.
16. See form.
17. See form.
18. See form.
19. See form.
20. See form.
21. See form.
22. See form.
23. See form.
24. See form.
25. See form.



Sunday, September 15, 2019

8:00-9:30am	Breakfast at your leisure, Historic Inns - Bag Call
9:30-11:30am	<p>Ira Chaleff <i>The Courageous Chief of Staff: The Art of Providing Guidance and Feedback to the Senator</i></p> <p>Ira Chaleff, Chairman Emeritus of The Congressional Management Foundation, and author of the award-winning book "The Courageous Follower: Standing Up To and For Our Leaders", will do a reprise of the well-received talk he gave at the 2009 Chiefs of Staff conference. While each Senator is unique, as is the relationship with the Chief, there are certain commonalities that occur in the exercise of power. These require close advisors to use courage and skill to minimize blind spots and maximize success. Ira will examine these with the chiefs and offer approaches to add to the existing tool kits the chiefs have developed.</p>
12:00pm	Pick up box lunches
12:15pm	Buses depart
1:30pm	Arrive Capitol Hill

SECRET

First Name	Last Name	Senate Office
Steve	Abbott	Sen. Susan M. Collins
Michelle	Altman	Sen. James P. Lankford
Michelle	Barlow Richardson	Sen. Roger F. Wicker
Allyson	Bell	Sen. Mike Lee
Reynaldo	Benitez	Sen. Catherine M. Cortez Masto
Sarah	Benzing	Sen. Sherrod C. Brown
Cassie	Bladow	Sen. John H. Hoeven III
Tony	Blando	Sen. Ron H. Johnson
Daniel	Brandt	Sen. Pat J. Toomey
Joe	Britton	Sen. Martin T. Heinrich
Brennen	Britton	Sen. Jerry Moran
Joel	Brubaker	Sen. Shelley Moore Capito
Jami	Burgess	Sen. Maria Cantwell
Larry	Burton	Sen. Dan S. Sullivan
Neil	Campbell	Sen. Jack F. Reed
Joi	Chaney	Sen. Kirsten E. Gillibrand
Steve	Chartan	Sen. Ted Cruz
David	Cleary	Sen. Lamar Alexander
Dara	Cohen	Sen. Jacklyn S. Rosen
Caryn	Compton	Sen. Bernie Sanders
John	Connell	Sen. Todd C. Young
Kathleen	Connery Dawe	Sen. Angus S. King Jr.
Jackie	Cottrell	Sen. Pat Roberts
Doug	Coutts	Sen. Tom Cotton
Aaron	Cummings	Sen. Chuck Grassley
Dayne	Cutrell	Sen. Richard C. Shelby
Jonathan	Davidson	Sen. Michael F. Bennet
Jennifer	DeCasper	Sen. Tim E. Scott
J.P.	Dowd	Sen. Patrick J. Leahy
Eric	Einhorn	Sen. Brian E. Schatz
Kaitlin	Fahey	Sen. Tammy Duckworth
Eric	Feldman	Sen. Gary C. Peters
Charles	Flint	Sen. Marsha Blackburn
Kristen	Gentile	Sen. Bob Casey
Lisa	Goeas	Sen. Joni K. Ernst
Marc	Goldberg	Sen. Maggie Hassan
Samuel	Goodstein	Sen. Sheldon Whitehouse
David	Grannis	Sen. Dianne Feinstein
Dana	Gresham	Sen. Doug Jones
Mark	Gruman	Sen. Kevin J. Cramer

1
2
3
4
5
6
7
8
9
10

First Name	Last Name	Senate Office
Joe	Hack	Sen. Deb Fischer
Coti	Haia	Sen. Mazie Hirono
Mike	Harney	Sen. Mark R. Warner
Patrick	Hayes	Sen. Joe Manchin III
William	Henderson	Sen. Rand Paul
Mike	Henry	Sen. Tim M. Kaine
Allison	Herwitt	Sen. Chris S. Murphy
Natasha	Hickman	Sen. Richard M. Burr
Toni-Marie	Higgins	Sen. John N. Boozman
Luke	Holland	Sen. James M. Inhofe
John	Insinger	Sen. James E. Risch
Mark	Isakowitz	Sen. Rob J. Portman
Beth	Jafari	Sen. John Cornyn III
Mark	Johnston	Sen. Mike Rounds
Meg	Joseph	Sen. Kyrsten Sinema
Joshua	Kelley	Sen. Mike Braun
Joel	Kelsey	Sen. Richard Blumenthal
Joan	Kirchner Carr	Sen. Johnny Isakson
Coy	Knobel	Sen. Mike B. Enzi
Rohini	Kosoglu	Sen. Kamala D. Harris
Chad	Kreikemeier	Sen. Jeanne Shaheen
Dan	Kunsman	Sen. John A. Barrasso
Dylan	Laslovich	Sen. Jon Tester
Ted	Lehman	Sen. Thom R. Tillis
Mindi	Linguist	Sen. Patty Murray
Jeff	Lomonaco	Sen. Tina Smith
Christopher	Lynch	Sen. Ben L. Cardin
Michael	Lynch	Sen. Charles E. Schumer
Becky	Marr	Sen. John Thune
Philip	Maxson	Sen. Mitch McConnell
Stacy	McBride	Sen. Roy D. Blunt
Jeffrey	Michels	Sen. Ron Wyden
Anne	Morris Reid	Sen. Elizabeth A. Warren
Bill	Murat	Sen. Tammy Baldwin
Mike	Needham	Sen. Marco Rubio
Ryan	Nelson	Sen. John Thune
Bianca	Ortiz-Wertheim	Sen. Tom S. Udall
Mike	Pawlowski	Sen. Lisa A. Murkowski
Elizabeth	Peluso	Sen. Amy Klobuchar
Richard	Perry	Sen. Lindsey Graham

2019 Bipartisan Senate Chiefs of Staff Conference
September 13-15, 2019
List of Invited Staff

First Name	Last Name	Senate Office
Brendon	Plack	Senate Majority Whip
Kyle	Plotkin	Sen. Josh Hawley
James	Quinn	Sen. Bill Cassidy
Karen	Robb	Sen. Chris J. Van Hollen Jr.
Preston	Robinson	Sen. John N. Kennedy
Justin	Roth	Sen. Martha E. McSally
Tricia	Russell	Sen. Cory A. Booker
Erin	Sager Vaughn	Sen. Charles E. Schumer
Raymond	Sass	Sen. Ben Sasse
Jacqueline	Schutz Zeckman	Sen. Rick Scott
Sharon	Soderstrom	Senate Majority Leader
Patrick	Souders	Sen. Dick Durbin
Emily	Spain	Sen. Tom R. Carper
Jonathan	Stahler	Sen. Christopher A. Coons
Curtis	Swager	Sen. Cory S. Gardner
Jason	Thielman	Sen. Steve Daines
Fred	Turner	Sen. Bob Menendez
Matt	Van Kuiken	Sen. Debbie A. Stabenow
Matt	Waldrip	Sen. Mitt Romney
Susan	Wheeler	Sen. Mike D. Crapo
Brad	White	Sen. Cindy Hyde-Smith
Megan	Whittemore	Sen. David A. Perdue Jr.
Michael	Zamore	Sen. Jeff A. Merkley

2
3
4
5
6
7
8
9
10
11
12
13

**Annapolis, Maryland | September 13-15, 2019**

The Pew Charitable Trusts

**Invites You and Your Spouse/Significant Other
To the 7th Biennial**

Senate Chiefs of Staff Management and Leadership Conference

Annapolis, Maryland
September 13-15, 2019

The Pew Charitable Trusts will host a conference for the Senate Chiefs of Staff from September 13-15, 2019, in Annapolis, Maryland. It promises to be an engaging weekend where you can learn from some of the most interesting speakers on management, leadership, and civility today. A copy of the agenda is attached.

We will depart from behind the Dirksen Building on Friday, September 13, on a chartered bus and return on Sunday, September 15. Chiefs' expenses (minus alcohol and entertainment) are covered by The Pew Charitable Trusts. If you wish to invite your spouse, you may reimburse Pew for those expenses (estimated at around \$175) after the conference.

Your pre-travel paperwork is due to the Select Committee on Ethics, 220 Hart, no later than Wednesday, August 14, 2019. You do not need to list accompanying spouses/significant others on the ethics form. [Click here to download the paperwork.](#)

[Click here to register](#)

If you are unable to attend, please [click here](#).
We look forward to seeing you in historic Annapolis this fall!

Tamera Luzzatto
Senior Vice President, Government Relations
The Pew Charitable Trusts
tluzzatto@pewtrusts.org
(202) 540-6501

United States Senate

SELECT COMMITTEE ON ETHICS

September 3, 2019

Bill Murat
Office of Senator Tammy Baldwin
United States Senate
Washington, DC 20510

Dear Mr. Murat:

This responds to your recent correspondence concerning an invitation you received to travel to the *Bipartisan Senate Chiefs of Staff Conference* in Annapolis, Maryland, on September 13–15, 2019, sponsored by The Pew Charitable Trusts (Pew). Pew certified to the Select Committee on Ethics (the Committee) that it will pay the *necessary expenses*¹ related to the travel and that it is neither a lobbyist, nor lobbying firm, nor agent of a foreign principal, and it is not otherwise acting as a representative or agent of a foreign government. However, Pew has certified that it is an organization designated under § 501(c)(3) of the Internal Revenue Code² that retains or employs a registered lobbyist and that no registered lobbyist or agent of a foreign principal will accompany you at *any point throughout your trip*.³

Based on information and materials available to the Committee, and assuming the **actual** travel and travel-related expenses conform to the information and materials you provided, it appears that the proposed payment or reimbursement of necessary expenses for this trip **may be accepted** under relevant Senate Rules and the Committee's *Regulations and Guidelines for Privately-Sponsored Travel*, so long as at the time of the payment or reimbursement, Pew is neither a registered lobbyist nor lobbying firm under the Lobbying Disclosure Act of 1995, nor an agent of a foreign principal under the Foreign Agents Registration Act (and is not otherwise acting as a representative or agent of a foreign government), and provided the travel and all required documents are disclosed to the Secretary of the Senate in accordance with the provisions of Senate Rules 34 and 35.

Under Senate Rule 35, Senate staff must receive advance authorization signed by the Member or officer under whose direct supervision the individual works in order to accept payment or reimbursement for necessary expenses related to fact-finding travel. Further, such authorization and expenses must be disclosed to the Secretary of the Senate by filing the completed *Employee Pre-Travel Authorization* and the *Employee Post-Travel Disclosure of Travel Expenses* (Form RE-1 and Form RE-2), along with a copy of the *Private Sponsor Travel*

¹ The term “necessary expenses” has a specific definition. See *Select Committee on Ethics’ Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 8.

² 26 U.S.C. § 501(c)(3).

³ The term “any point throughout your trip” has a specific definition. See *Select Committee on Ethics’ Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 2.

ST
CD
CD
CD
CD
CD
CD
CD
CD
CD
CD
CD

Finally, Senate Rule 34 requires a reporting individual⁴ on his or her Financial Disclosure Report, to make an annual disclosure of the receipt of payments or reimbursements under Senate Rule 35 from a private sponsor for officially-related travel expenses where, in the aggregate, travel expenses exceed \$390 from that sponsor during a calendar year. However, if a Member, officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their Financial Disclosure Report.

Sincerely,

Deborah Sue Meyer

Enclosure: Travel Checklist

2